

Chapter 13 - Adjustments - ADJ

Adjustments

The purpose of an adjustment is to transfer either all or a portion of a parties account.

An adjustment can be completed from within a case, from one child within a case to another child within the same case or from one case to a different case. Before completing the adjustment, you will need to know the following information.

1. Case, suffix and party numbers that the original payment was applied to.
2. Effective date of the original price code.
3. Dollar amount being adjusted.
4. Reason for the adjustment.
5. Case, suffix and party numbers that the payment is being adjusted to.
6. Effective date of the price code that the adjustment is going to be applied to.

Accessing the A/R Adjustment screen:

From the transaction request screen, enter **ADJ** in the next tran field and **INQ** in the type field along with the receipt number in the case number field that you want to inquire on and press <Enter>.

Probate Next Tran Line:

NXT	TRAN	P	ADJ	TYPE	____	CASE	NBR	00000000	REC	NBR	____
-----	------	---	-----	------	------	------	-----	----------	-----	-----	------

Juvenile Next Tran Line:

NXT	TRAN	ADJ	TYPE	____	CASE	NBR	00000000	____	PET	00000000	EVT	____	PTY	____
-----	------	-----	------	------	------	-----	----------	------	-----	----------	-----	------	-----	------

The following screen will be displayed for you.

Court : J44 ANGIE Juvenile A/R Adjustment Screen Release : 025

Move dollars in this court order or Account

Enter responsible billing party for the next event

Case sfx Party
00000000

From event information

Person suffix Petition 00000000 Event no.
Price code
Effect date MMDD CCYY

Dollar amount Reason
and place the dollars in this court order or this account only

Enter responsible billing party for this next event

Case sfx Party
00000000

To event information

Person suffix Petition 00000000 Event no.
Price code
Effect date MMDD CCYY

Enter YOUR Pass Word

Nxt Tran ADJ Type INQ Case# 00895019 Petn# 00000000 Event# Party
F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System
F8=Probate F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal

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Following are field descriptions for the Master Payment Inquiry screen.

~Enter responsible billing party for the next event~

The following information is gathered from the financial order that you want to adjust from.

~Case~

This is the case number that you want to adjust from.

~Sfx~

This is the suffix number of the case that you want to adjust from. This field is only used for Juvenile adjustments.

~Party~

This is the party that the financial order was applied to. By prompting on this field <F4> and selecting the correct financial order a majority of this screen will be loaded for you by the system.

~From Event Information~

The following information is gathered from the FRD and event that is being adjusted.

~Person Suffix~

This is the suffix number that the party was entered on for this financial order.

~Petition~

This is the petition number that this financial order was applied to.

~Event No~

This is the event number associated with this financial order.

~Price Code~

This is the price code (taken from the PRM screen) that the adjustment is being made from.

~Effective Date~

This is the effective date of the price code. To find the effective date you will need to display the PRM screen. This information is not filled in by the system. It must be entered if there is an effective date on this PRM.

~Dollar Amount~

This is the amount that you want to adjust from this financial order.

~Reason~

This is the reason you are processing this adjustment.

~Enter Responsible billing party for this next event~

The following information pertains to the party and financial order that you are adjusting to.

~Case~

This is the case number that you are adjusting to.

~Suffix~

This is the suffix number that you are adjusting to.

~Party~

This is the party number that the adjustment will be applied to. By prompting on this field <F4> and selecting the correct financial order, most of this section will be filled in by the system.

~To Event information~

The following information is gathered from the financial order that the amount is being adjusted to. There must be a financial order created before an adjustment can be processed.

~Person Suffix~

This is the suffix number of the party that was ordered to pay this financial order.

~Petition~

This is the petition number that this financial order is assigned to.

~Event No~

This is the event number that this financial order is assigned to.

~Price Code~

This is the price code (taken from the PRM screen) that the adjustment is being made from.

~Effective Date~

This is the effective date of the price code. To find the effective date you will need to display the PRM screen. This information is not filled in by the system. It must be entered if there is an effective date on this PRM.

~Enter your Password~

Enter your financial password. You must have authority to process adjustments.

Creating an Adjustment:

Adjustments are used to transfer payments from one financial order to another financial order. The purpose of a credit memo is to credit a portion of or all of a parties account. Following is an example of an adjustment. You must have authority to adjustments.

Before you begin, you will need to know the following information:

1. Case numbers and suffix numbers of the cases that will be adjusted.
2. The amount that needs to be adjusted.
3. If there is an effective date on the price code that needs adjusted. To find if there is an effective date you will need to display the PRM screen by entering **PRM/INQ** on the next tran line.

NXT TRAN	ADJ	TYPE	___	CASE NBR	00000000	___	PET	00000000	EVT	___	PTY	___
----------	-----	------	-----	----------	----------	-----	-----	----------	-----	-----	-----	-----

The following screen will be displayed for you.

Juvenile Price File Release : 025

Code	Description	Effect date	Money Type	Amount	Status
ADM	ADMINISTRATIVE FEES	00/00/0000	PERCENT	100.00	Y
AFE	ATTORNEY FEES	00/00/0000	PERCENT	100.00	Y
AFE	ATTORNEY FEES	10/10/2001	PERCENT	100.00	Y
ALC	ALCOHOL CLASSES	00/00/0000	PERCENT	100.00	Y
BET	BETTY PRICE FILE	00/00/0000	PERCENT	100.00	Y
BET	BETTY PRICE FILE	07/03/2002	PERCENT	100.00	Y
BET	BETTY'S PRICE FILE	10/01/2002	PERCENT	100.00	Y
BND	BOND FEE	00/00/0000	PERCENT	100.00	Y
BON	POSTED BOND	00/00/0000	PERCENT	100.00	Y
CC1	CERTIFIED COPIES	00/00/0000	CASH	5.00	Y
CMF	PROSECUTION COLLECTION	07/11/1996	PERCENT	100.00	Y
COC	COST OF CARE	00/00/0000	PERCENT	100.00	Y
COW	CHILD CARE COST/COUNTY WARD	00/00/0000	PERCENT	100.00	Y
CPP	CHOICE POINT PROGRAM	00/00/0000	PERCENT	100.00	Y
CRM	CREDIT MEMO	00/00/0000	PERCENT	100.00	Y

More...

Nxt Tran **PRM** Type **INQ** Case# 00895019 Petn# 00000000 Event# Party

F1=Help F2=Nxt Tran F3=Exit F7=Active/Inactive Codes

F8=Probate F9=Name Inq. F11=Alt.View F14=Dkt.Inq F16=Inv.Cal

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Once you find the price file, check the effective date.

If the date is 00/00/0000 then there is not an effective date. The only time you enter an effective date on the credit memo screen is if an actual date appears here.

Creating an Adjustment:

Accessing the A/R Adjustment screen:

From the transaction request screen, enter **ADJ** in the next tran field and **INQ** in the type field along with the receipt number in the case number field that you want to inquire on and press <Enter>.

Probate Next Tran Line:

```
NXT TRAN  P ADJ  TYPE ____  CASE NBR  00000000  REC NBR  ____
```

Juvenile Next Tran Line:

```
NXT TRAN      ADJ  TYPE ____  CASE NBR  00000000  PET  00000000  EVT  ____  PTY  ____
```

The following screen will be displayed for you.

```

Court : J44 ANGIE      Juvenile A/R Adjustment Screen
                        Move dollars in this court order or Account
Enter responsible billing party for the next event
Case      sfx Party
216      1
From event information
Person suffix  Petition 00000000  Event no. 
Price code 
Effect date MMDD  CCYY 

Dollar amount      Reason 
and place the dollars in this court order or this account only

Enter responsible billing party for this next event
Case      sfx Party
00000000 
To event information
Person suffix  Petition 00000000  Event no. 
Price code 
Effect date MMDD  CCYY 

Enter YOUR Pass Word

Nxt Tran  ADJ Type INQ Case# 00000216 1 Petn# 00000001 Event#  Party 
F1=Help  F2=Nxt Tran  F3=Exit  F4=Prompt  F6=System
F8=Probate  F9=Name Inq.  F14=Dkt.Inq  F16=Inv.Cal

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1. Enter the case number and suffix number of the child that the financial order was applied to.
2. Prompt <F4> on the party field. The system will display the following screen.

Court : J44 ANGIE Juvenile A/R Adjustment Screen
 Move dollars in this court order or Account
 Enter responsible billing party for the next event

F	Case	Sfx	Party Num	Type	Cost Type	Amount to Pay	Amount Paid	Petition	Evt#
P	X 00000216	1	J01		RST	40.00	160.00	00000002	5
	00000216	1	2 F01		RST	100.00	300.00	00000002	5

D
a
E
Bottom
F1=Help F3=Exit F6=System F16=Inv.Cal

Price code
 Effect date MMDD CCYY

Enter YOUR Pass Word

Nxt Tran ADJ Type INQ Case# 00000216 1 Petn# 00000001 Event# Party
 F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System
 F8=Probate F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal

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3. Select the financial order that you want to adjust from by placing an "X" on the line beside it and pressing <Enter>. The system will display the following screen.


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Court : J44 ANGIE      Juvenile A/R Adjustment Screen
                        Move dollars in this court order or Account
Enter responsible billing party for the next event
Case      sfx Party
00000216  1
From event information
Person suffix 1  Petition 00000002  Event no. 5
Price code RST
Effect date MMDD CCYY
Dollar amount      Reason
and place the dollars in this court order or this account only

Enter responsible billing party for this next event
Case      sfx Party
00000000
To event information
Person suffix      Petition 00000000  Event no.
Price code
Effect date MMDD CCYY

Enter YOUR Pass Word

Nxt Tran  ADJ Type INQ Case# 00000216 1 Petn# 00000001 Event#      Party
F1=Help  F2=Nxt Tran F3=Exit F4=Prompt F6=System
F8=Probate F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal

```

4. The system has pre-filled as much information that it could bring in from the financial order. You will have to enter the following information.
5. Effective date.
6. Dollar amount to be adjusted.
7. Reason for the adjustment.

After the above information is entered on the screen, the To event information must be entered. Follow the steps listed above.

5. Enter your financial password and press <Enter>. The following screen will be displayed.

Court : J44 ANGIE Juvenile A/R Adjustment Screen			
Move dollars in this court order or Account			
Enter responsible billing party for the next event			
Case	sfx	Party	Name
00000216	1		TEST NAME
			Relation
			J01 JUV SUBJECT
From event information			
Person suffix	1	Petition	00000002
Name	TEST NAME		Event no. 5
		Price code	RST RESTITUTION
		Effect date	MMDD CCYY
Dollar amount	10.00	Reason	TEST
and place the dollars in this court order or this account only			
Enter responsible billing party for this next event			
Case	sfx	Party	Name
00000216	1	2	TESTFATHER
			Relation
			F01 FATHER
To event information			
Person suffix	1	Petition	00000002
Name	TEST NAME		Event no. 5
		Price code	RST RESTITUTION
		Effect date	MMDD CCYY
Enter YOUR Pass Word			
Press F10 to complete the transaction			
Nxt Tran	ADJ	Type INQ	Case# 00000216 1 Petn# 00000001 Event# Party
F1=Help	F2=Nxt Tran	F3=Exit	F4=Prompt F6=System
F8=Probate	F9=Name Inq.	F10=Update	F14=Dkt.Inq F16=Inv.Cal

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Press <F10> to complete the transaction. Once you press <F10>, the adjustment will be completed.

After you have processed the adjustment, the system will print an adjustment receipt for your records and display the following screen.

Court : J44 ANGIE Juvenile A/R Adjustment Screen
Move dollars in this court order or Account

Enter responsible billing party for the next event

Case sfx Party
00000000

From event information

Person suffix Petition 00000000 Event no.
Name Price code
Effect date MMDD CCYY

Dollar amount Reason
and place the dollars in this court order or this account only

Enter responsible billing party for this next event

Case sfx Party Name Relation
00000000

To event information

Person suffix Petition 00000000 Event no.
Name Price code
Effect date MMDD CCYY

Enter YOUR Pass Word

Move completed receipt # 90000970 and receipt # 90000971

Nxt Tran ADJ Type INQ Case# 00000216 1 Petn# 00000001 Event# Party
F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System
F8=Probate F9=Name Inq. F14=Dkt.Inq F16=Inv.Cal

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